

Budget Prep Training Guide
Governor's Office of Planning and
Budget
FY 2011-2012

Budget Prep Training Guide

Introduction

This document serves as a “how-to” guide for creating, submitting, editing, and viewing budget information in the Budget Prep System.

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Getting in and getting out of Budget Prep

Logging into Budget Prep

Scenario: You need submit, view, or modify a budget. This is how you can login.

1. Go to this web address: <http://budgetprep.at.utah.gov> for training. The production system is located at <http://budgetprep.utah.gov>
2. You will be directed to the Utah Master Directory login screen. You will be prompted to login and use your network email address and password, then click the login button.

utah gov My Account Portal Google™ Custom Search Search

budgetprep.at.utah.gov/budgetprep

Please Login

Don't have a Utah-ID?
[Register Here](#)

Forgot your password?
[Recover Account](#)

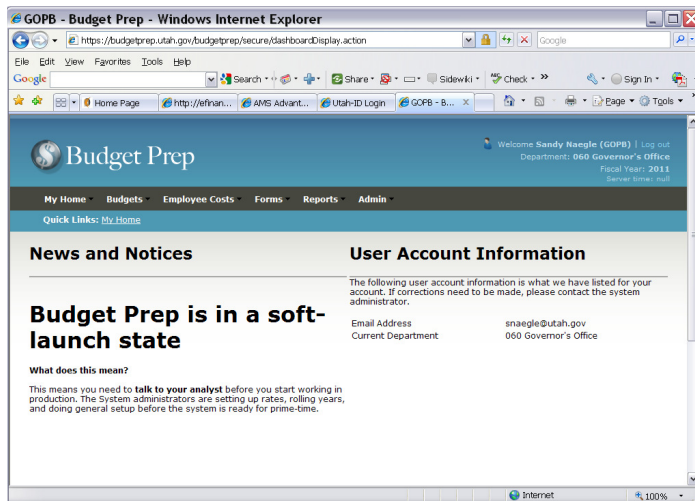
Email or Utah-ID:

Password:

Remember Me? ☒

[Privacy Policy](#) | [Ask for Help](#)

3. You will be directed to the main page where you can see a dashboard and menu items.

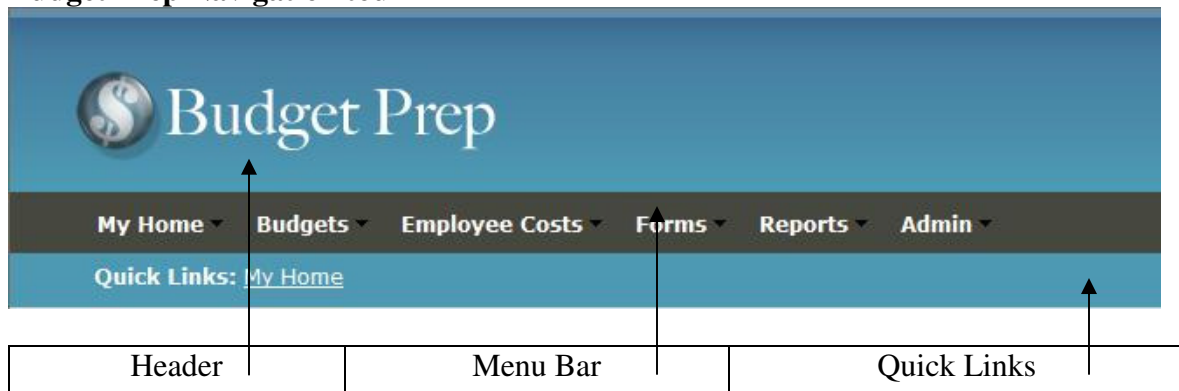


Logging out of Budget Prep

Scenario: You need to get out of the application

1. There are two ways to logout of the application:
 - a. You can choose the logout link at the top right of the screen. This will log you out and send you to the employee gateway.
 - b. You can just close the browser.

Budget Prep Navigation tour

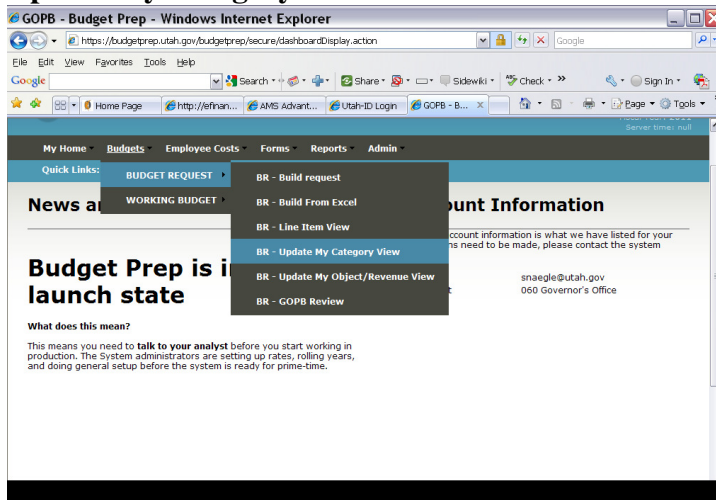


Setting Up Your Budget Prep Views

Scenario: You can customize your view settings to eliminate things that you don't deal with like the Mineral Lease category. Additionally, you can set all of your revenue and expense defaults.

Update Your Category View

1. Navigate to the **Budgets** menu item select **Budget Request** and then select **BR-Update My Category View** from the menu items.



2. All of the Revenue and Expense categories are selected, to remove a category, deselect the checkbox and the system will remove it from your view.

Budget Prep 'My View Setup'

We know that not everyone needs to work with all these categories and objects, so we've added a personalized view feature called 'My View'. You can add/remove categories with a click of the button.

Revenue Categories	Expense Categories
<input checked="" type="checkbox"/> BB Beginning Balance	<input checked="" type="checkbox"/> AA Personnel Services
<input checked="" type="checkbox"/> CB Closing Balance	<input checked="" type="checkbox"/> BB Travel / In State
<input checked="" type="checkbox"/> DC Dedicated Credits	<input checked="" type="checkbox"/> CC Travel / Out State
<input checked="" type="checkbox"/> EF Education Fund	<input checked="" type="checkbox"/> DD Current Expense
<input checked="" type="checkbox"/> FF Federal Funds	<input checked="" type="checkbox"/> EE Data Proc Current Expense
<input checked="" type="checkbox"/> GF General Fund	<input checked="" type="checkbox"/> FF Data Proc Capital Expend
<input checked="" type="checkbox"/> LB Lapsing Balance	<input checked="" type="checkbox"/> GG Capital Expend (Except DP)
<input checked="" type="checkbox"/> ML Mineral Lease	<input checked="" type="checkbox"/> HH Other Charges / Pass Through
<input checked="" type="checkbox"/> PT Pass Through	<input checked="" type="checkbox"/> LL Cost of Goods Sold
<input checked="" type="checkbox"/> RR Restricted and Trust Funds	<input checked="" type="checkbox"/> NN Cost Accounts
<input checked="" type="checkbox"/> RT Transfers	<input checked="" type="checkbox"/> TA Trust & Agency Disbursements
<input checked="" type="checkbox"/> TF Transportation Fund	<input checked="" type="checkbox"/> TR Transfers
<input type="button" value="Save My View"/>	

3. To save your preferences, click on the Save My View button.
4. This step must be done the first time you try to go to Budget-Build Budget. If you do not go here first the system will default you to this sight.

Update Your Object/Revenue View

1. Navigate to the **Budgets** menu item **Budget Request** and then select **BR-Update My Object/Revenue View** from the menu items. (See example above)
2. Add your Revenue and Expense defaults by selecting the corresponding buttons. This action will add any Revenue or Expense items that were used in your department for actuals.

Budget Prep 'My View Setup for Objects and Revenues'

My View Setup

Expand each of the categories by pushing the down arrow button. You will see all of the revenue/objects that are in your view. You can remove them by pushing the 'x' button. You can add new ones by typing a code or description under the appropriate category.

Have too many to add? Click the 'Add Defaults' button and all expense/revenues under your department that are in the system will be added automatically. This will not remove any that you have added already, just append to the list.

Revenue & Object Selection

REVENUES



	GF General Fund
---	-----------------

3. You can add other defaults as needed for budgeting purposes. First click on the Orange Arrow icon to expand the Expense bucket you want to add to.

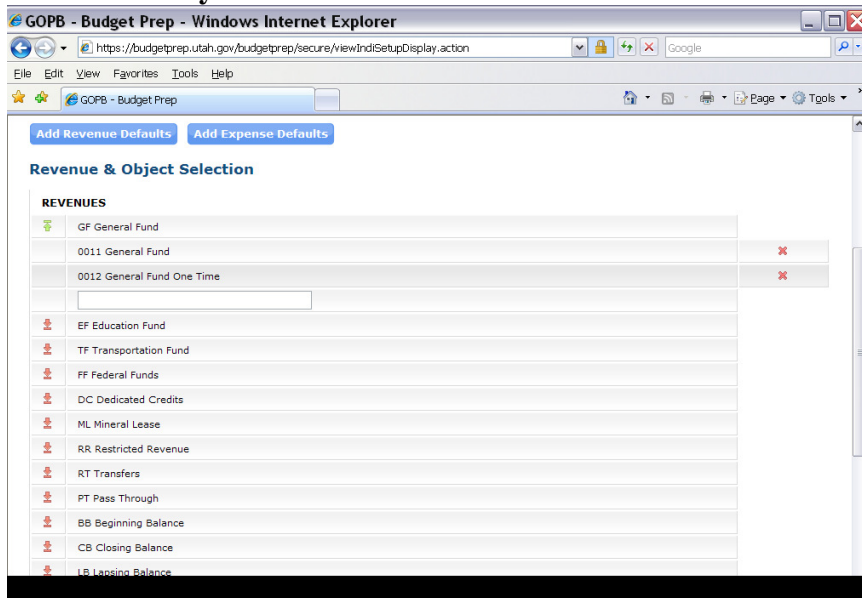
EXPENSES

	AA Personnel Services
	BB Travel / In State
	CC Travel / Out State
	DD Current Expense
	EE Data Proc Current Expense
	FF Data Proc Capital Expend

Enter a value in the input field. The program will display the any matching value. Simply click on the corresponding checkbox for the revenue/expense to add it to the listing.

	6407 Energy Conservation Improvements-Current Expense
	<input type="text" value="6136"/>
	 1 results found.
	<input type="checkbox"/> 6136 Postage & Mailing
	EE Data Proc Current Expense

4. Delete a revenue/expense listing from your view by first, expanding the category by clicking on the corresponding Orange Arrow. Then click on the Orange X next to the revenue/expense. **There is no warning message to confirm this deletion, so be sure you want to do it.**

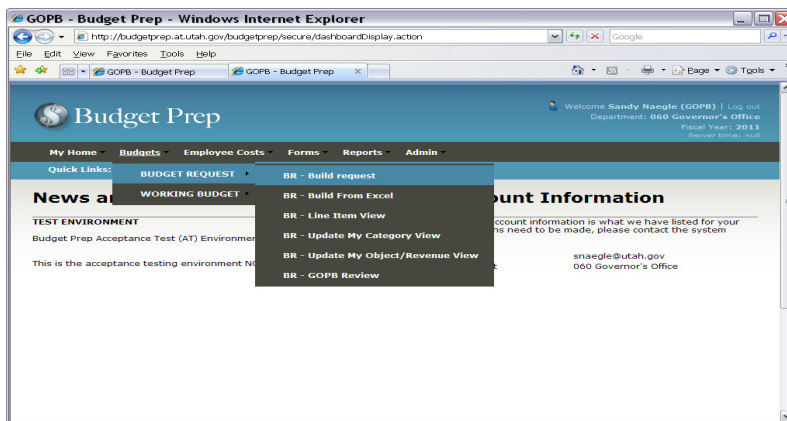


Building your Budget

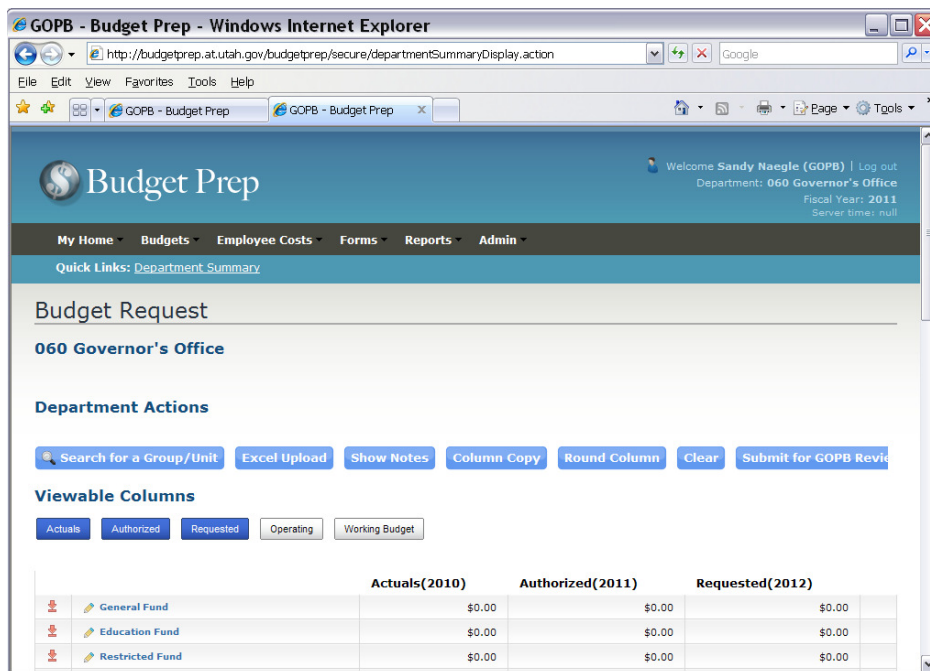
Starting Your Budget

Scenario: The time has come that you have been waiting for! It's time to build your budget.

1. Navigate to the **Budgets** menu item and select **BR-Build Budget Request** from the menu items



2. The budget request screen has several options:



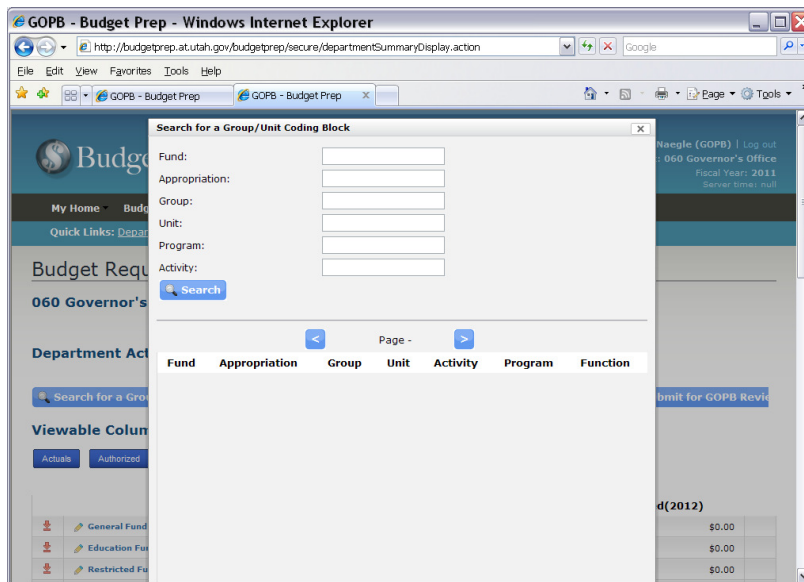
- a. This screen is a summary of your entire department and has no data entry capability.
- b. You can execute certain actions like Search for a Unit, Copy Columns, Clear Columns or Round Columns. Most of you will not see the Submit for GOPB review.
- c. You can determine your viewable columns
- d. You can see your totals for balancing purposes (Tables 1-15)

Navigating to Budget Data Entry

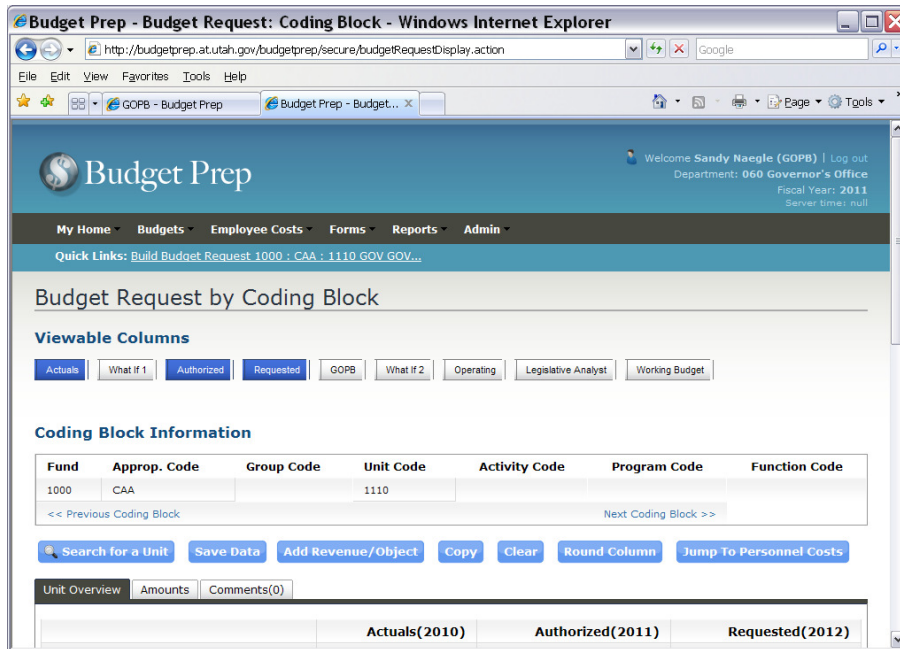
Scenario: Enter dollar amounts at the unit/group level to build your budget.

Navigate to the **Budgets** menu item and select **BR-Build Budget Request** from the menu items

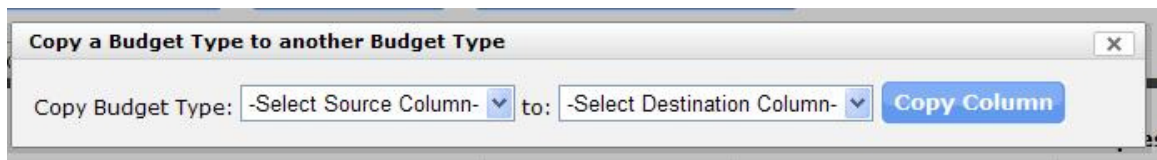
1. From the Budget Request Category screen select the **Search for a Unit/Group** button (See screenshot under Starting Your Budget.).
2. This will bring up a dialog box where you can search for a unit/group by Fund, Appropriation, Group, Unit, Program, or Activity. It is recommended that you do not filter by more than two choices.



3. Enter a value in the one or two of the fields and click on the Search button.
4. From the generated list select the desired appropriation link. The smaller the granulation of the filter the fewer items will be returned from the search.
5. This will bring you to the Coding Block page. At the top you have coding block information, with the ability to move to the next or previous coding block using the links provided **<< Previous Coding Block** and **Next Coding Block >>**.



6. **Copy Columns** allows you to copy one column to another.



7. **Clear** and **Round** buttons act like the button on the main Department page, but only for the unit/group you are working in.
8. **Jump to Personnel Costs** will take you to the personnel costs for that unit.
9. Employee costs will be covered later in the training.

Budget Prep - Unit Personnel Costs - Windows Internet Explorer

http://budgetprep.at.utah.gov/budgetprep/secure/personnelUnitAssignmentSearch.action?organization=

File Edit View Favorites Tools Help

★ Budget Prep Budget Prep - Unit P...

Budget Request Unit Assignment Costs

Unit: [Search](#) [Reset](#)

1110 GOV GOVERNOR Personnel Costs

1000-CAA-1110--- Assignments

Data reflects unit assignment costs for all employees who are assigned to coding block 1000-CAA-1110---

(does not necessarily reflect costs by HOME unit)

[Jump to Build Budget 1110 GOV GOVERNOR 1000-CAA-1110---](#) [PDF Report](#) [Excel Report](#)

23 items found, displaying all items.1

LASTNAME	FIRSTNAME	EIN	AUTH FTE	AUTH %	AUTH COST	REQ FTE	REQ %	REQ COST	Edit	Delete
Bailey	Pamela Blackham	120993	0	50	\$1,372.20	100	25	\$21,675.50	Edit	Delete
Bradford	Cherilyn A	143427	100	100	\$75,578.46	100	100	\$75,578.46	Edit	Delete
Bradford COPY	Cherilyn A COPY	HPPAYB4DQ1	100	100	\$75,578.46	100	100	\$75,578.46	Edit	Delete
Buchholz	Ashlee	159819	100	100	\$56,012.11	100	100	\$56,012.11	Edit	Delete
Deakin	Susan C.	171933	100	100	\$49,169.95	100	100	\$49,169.95	Edit	Delete

Budget Request by Coding Block

Scenario: Data entries of amounts are ready to be entered into Budget Prep

This screen has three tabs under the blue buttons

1. **Unit Overview** – This gives you a full overview of the unit. Including totals and Category detail.

Unit Overview			
Amounts Comments(0)			
	Actuals	Authorized	Requested
Revenue			
GF General Fund	\$0.00	\$0.00	\$0.00
EF Education Fund	\$0.00	\$0.00	\$0.00
TF Transportation Fund	\$0.00	\$0.00	\$0.00

2. **Amount** – Is the screen where your actuals, authorized, and requested amounts are entered for revenue and expenditures.
3. **Additional Lines**- If more lines are needed for data entry, go to the last row and column and hit enter and a new line will be added with

Budget Prep - Budget Request: Coding Block - Windows Internet Explorer

http://budgetprep.at.utah.gov/budgetprep/secure/budgetRequestDisplay.action?selectedOrg.id=455418

File Edit View Favorites Tools Help

Search for a Unit Save Data Add Revenue/Object Copy Clear Round Column Jump To Personnel Costs

Unit Overview Amounts Comments(0)

Edit Budget for DD Current Expense

<< CC Travel/Out of State DD Current Expense EE Data Processing Current Expense >>

	Actuals	Authorized	Requested
6117 Alcoholic Beverage Control Package Agency Contract Payments	0	0	0
6119 Fingerprint/Background Check	0	0	0
6120 Client Support-In State Travel	0	0	0
6122 Client Support-Food	0	0	0
6123 Client Support-Other Services	0	0	0
6126 Wireless Communication Service	0	0	0
6127 Collection Costs	0	0	0
6128 Human Services Communication Services Reimbursements	0	0	0
6129 Electronic Funds Transfer Fees	0	0	0
6131 Advertising & Legal Publications	0	0	0
6132 Communication Services	0	0	0
6133 Freight & Drayage	0	0	0
6134 Investigations	0	0	0
6135 Other Contractual Services-Non-medical	0	0	0
6136 Postage & Mailing	0	0	0
6137 Professional & Technical Services-Non-medical	0	0	0

4. **Comments** – You can save a comment regarding your current work on this unit. This will stay with this unit and you have the ability to see the history of what comments have been made.

Unit Overview Amounts Comments(0)

Comments

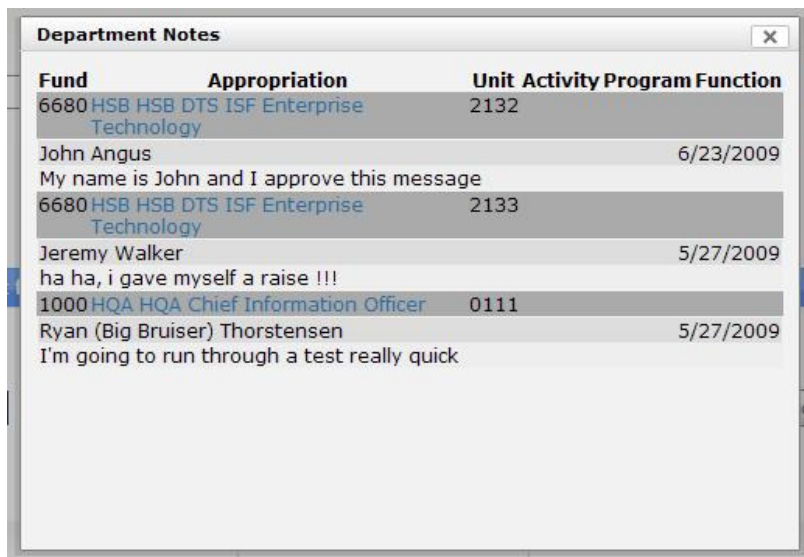
Save Comment

Comment	User	Date
---------	------	------

See Notes Made in the Budget Request

Scenario: I want to see any notes made on my agencies budget.

1. Navigate to the **Budgets** menu item and select **BR-Build Budget Request** from the menu items. (See screen above)
2. From the **Build Budget Request** screen select the **Show Notes** button (See screenshot under Starting Your Budget.).
3. This will display any notes made in the comments fields of the units.
4. Jump to a unit that has comments on it by clicking the coding block line. This takes you to the Coding Block View for that Unit



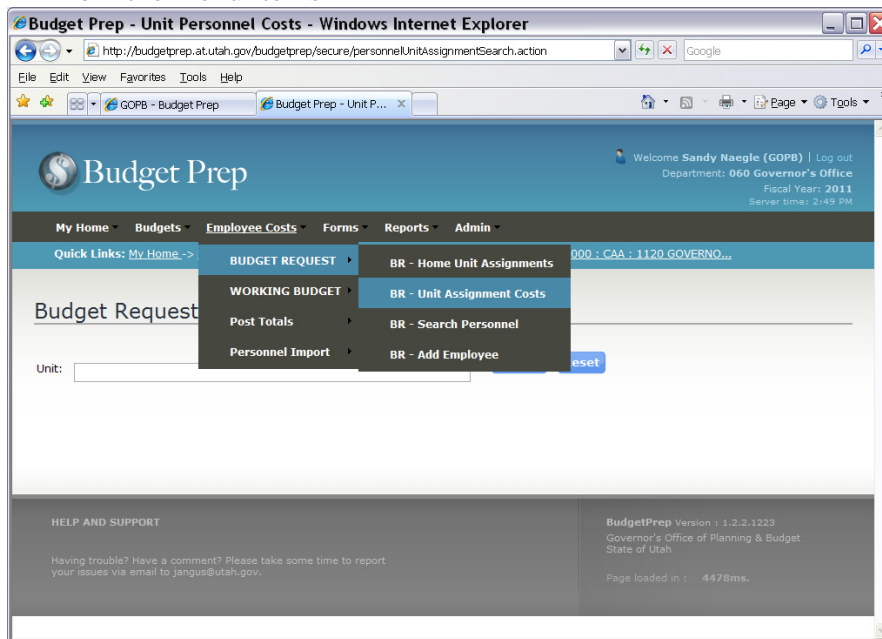
Fund	Appropriation	Unit	Activity	Program	Function
6680	HSB HSB DTS ISF Enterprise Technology	2132			
John Angus					
My name is John and I approve this message					
6680	HSB HSB DTS ISF Enterprise Technology	2133			
Jeremy Walker					
ha ha, i gave myself a raise !!!					
1000	HQA HQA Chief Information Officer	0111			
Ryan (Big Bruiser) Thorstensen					
I'm going to run through a test really quick					

Adjusting Your Employee Costs

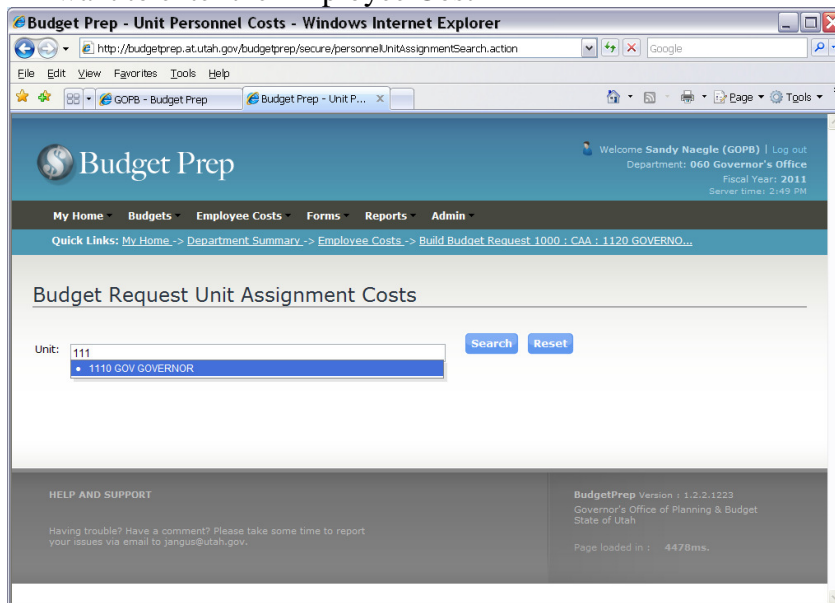
View Unit Personnel Costs

Scenario: Show the personnel costs by Unit.

1. Navigate to the **Employee Costs** menu item and select **BR-Unit Personnel Costs** from the menu items



2. Budget Request Unit Assignment Costs are where you enter the unit number you want to enter the Employee Cost



3. This will display the individual personnel costs for that unit. There will also be a total cost at the bottom of the page.
4. BR-Home Unit will show the same thing minus the total. (Why I use Unit view)

Budget Request Unit Assignment Costs

Unit: [Search](#) [Reset](#)

1110 GOV GOVERNOR Personnel Costs

1000-CAA-1110--- Assignments

Data reflects unit assignment costs for all employees who are assigned to coding block 1000-CAA-1110---

(does not necessarily reflect costs by HOME unit)

[Jump to Build Budget 1110 GOV GOVERNOR 1000-CAA-1110---](#) [PDF Report](#) [Excel Report](#)

23 items found, displaying all items.1

LASTNAME	FIRSTNAME	EIN	AUTH FTE	AUTH %	AUTH COST	REQ FTE	REQ %	REQ COST	Edit	Delete
Bailey	Pamela Blackham	120993	0	50	\$1,372.20	100	25	\$21,675.50	Edit	Delete
Bradford	Cherilyn A	143427	100	100	\$75,578.46	100	100	\$75,578.46	Edit	Delete
Bradford COPY	Cherilyn A COPY	HPPAYB4DQ1	100	100	\$75,578.46	100	100	\$75,578.46	Edit	Delete
Buchholz	Ashlee	159819	100	100	\$56,012.11	100	100	\$56,012.11	Edit	Delete
Deakin	Susan C.	171933	100	100	\$49,169.95	100	100	\$49,169.95	Edit	Delete
One	John	FW81TSNMAM	100	100	\$60,324.01	100	100	\$13,979.42	Edit	Delete

5. Select **edit** next to one of the personnel to enter the Personnel Information screen.
6. Select **delete** to remove an employee. (there is not undo)

Budget Prep

Welcome Sandy Naegle (GOBP) | Log out
Department: 060 Governor's Office
Fiscal Year: 2011
Server time: 3:12 PM

[My Home](#) [Budgets](#) [Employee Costs](#) [Forms](#) [Reports](#) [Admin](#)

Quick Links: [My Home](#) -> [Department Summary](#) -> [Employee Costs 1110 GOV GOVERNOR](#) -> [Build Budget Request 1000 : CAA : 1110 GOVERNO...](#)

Budget Request Personnel Information

*Unit: [Change Unit](#) [Save Employee](#)

Pamela Blackham Bailey [Jump to Personnel: Bailey, Pamela Blackham](#)

*EIN: 120993 Title: OFFICE ADMINISTRATOR, GOVR PCN: 06011035 [Jump to Build Budget](#)

[Salary](#) [Insurance](#) [Salary Driven Benefits](#) [Totals](#) [Unit & Funding Assignments](#)

Authorized (2011)

*Full Time Equivalent: %

*Step:

Hours Per Year:

*Date:

Requested (2012)

*Full Time Equivalent: %

*Step:

Hours Per Year:

*Date:

7. You can navigate to any of the selected employee's information by selecting one of the tabs (ie: Salary, Insurance, etc.). Make any modifications on the edit screen and click on the Save Employee button.

Budget Request Personnel Information

*Unit: 1110 GOV GOVERNOR Change Unit Save Employee

Pamela Blackham Bailey Jump to Personnel: Bailey, Pamela Blackham

*EIN: 120993 Title: OFFICE ADMINISTRATOR, GOVR PCN: 06011035 Jump to Build Budget

Salary Insurance Salary Driven Benefits Totals Unit & Funding Assignments

Authorized (2011)		Requested (2012)	
*Full Time Equivalent:	0 %	*Full Time Equivalent:	100 %
*Step:	0	*Step:	0
Hours Per Year:	40	Hours Per Year:	2088
*Rate:	60.00 \$2,400 annually	*Rate:	27.63 \$57,691.44 annually
Uniform Allowance:	0.00	Uniform Allowance:	0.00
Firefighter's Uniform Allowance:	0.00	Firefighter's Uniform Allowance:	0.00
Hazardous Duty Pay:	0.00	Hazardous Duty Pay:	0.00

Editing and Viewing Personnel Information

Scenario: Ready to work with personnel information.

You can adjust salary, benefits and assignments using the personnel information screen.

1. The personnel information screen has the features to adjust employee costs:
 - a. Another person can be selected using the drop-down list titled Jump to Personnel
 - b. Title and PCN allow you to make some edits to the employees information.
 - c. Tabs are across the top of the detail employee information
 - i. **Salary** – displays the salary information for the employee. You can make adjustments and move them to the requested column or manually enter data in both.
 - ii. **Steps** – although steps are now eliminated you can still use steps to enter rate of pay or enter the rate directly
 - iii. **Insurance** – Update the authorized and requested insurance information.

Budget Prep - Personnel Info - Windows Internet Explorer

http://budgetprep.at.utah.gov/budgetprep/secure/personnelEdit.action

*Unit: 1110 GOV GOVERNOR [Change Unit](#) [Save Employee](#)

Cherilyn A COPY Bradford COPY Jump to Personnel: [Bradford COPY, Cherilyn A COPY](#)

*EIN: HPPAYB4DQ1 Title: DIRECTOR OF BOARDS AND COMMISSIONS PCN: 06011038 [Jump to Build Budget](#)

Salary Insurance **Salary Driven Benefits** Totals Unit & Funding Assignments

Authorized (2011)			Requested (2012)		
Health Insurance:	PEHPA 1	\$4,727.32	Health Insurance:	PEHPA 1	\$4,727.32
Dental Insurance:	PEHP 1	\$524.68	Dental Insurance:	PEHP 1	\$524.68
Life Insurance:	36.66		Life Insurance:	36.66	

[Copy to Requested >>](#)

HELP AND SUPPORT

Having trouble? Have a comment? Please take some time to report your issues via email to jangus@utah.gov.

BudgetPrep Version : 1.2.2.1223
Governor's Office of Planning & Budget
State of Utah

Page loaded in : 4841ms.

iv. **Salary Driven Benefits** – The displayed information is driven by the employee-selected Retirement plan. You can see other alternatives by selecting a different plan from the Retirement pull-down menu.

v. **Benefits costs** are based on the benefit rates entered by GOPB

Budget Prep - Personnel Info - Windows Internet Explorer

http://budgetprep.at.utah.gov/budgetprep/secure/personnelEdit.action

*EIN: HPPAYB4DQ1 Title: DIRECTOR OF BOARDS AND COMMISSIONS PCN: 06011038 [Jump to Build Budget](#)

Salary Insurance **Salary Driven Benefits** Totals Unit & Funding Assignments

Authorized (2011)			Requested (2012)		
Retirement:	NONCONTRIB	16.320% \$8,679.20	Retirement:	NONCONTRIB	
401K (Non-Contrib):	1.500%	\$797.72	401K (Non-Contrib):	1.500%	
Social Security:	6.200%	\$3,297.24	Social Security:	6.200%	
Medicare:	1.450%	\$771.13	Medicare:	1.450%	
Workman's Comp:	0.700%	\$372.27	Workman's Comp:	0.700%	
Unemployment Insurance:	0.200%	\$106.36	Unemployment Insurance:	0.200%	
Termination Additive:	5.200%	\$2,765.43	Termination Additive:	5.200%	
Long Term Disability	<input checked="" type="checkbox"/>	0.600% \$319.09	Long Term Disability	<input checked="" type="checkbox"/>	

[Copy to Requested >>](#)

vi. **Totals** – Adds up the Salary, Insurance, and Retirement benefits.

The screenshot shows the 'Budget Prep - Personnel Info' interface in a Windows Internet Explorer browser. The page title is 'Budget Prep - Personnel Info - Windows Internet Explorer'. The URL is 'http://budgetprep.at.utah.gov/budgetprep/secure/personnelEdit.action'. The page contains several tabs: 'Salary', 'Insurance', 'Salary Driven Benefits', 'Totals', and 'Unit & Funding Assignments'. The 'Totals' tab is selected. It displays two tables: 'Authorized (2011)' and 'Requested (2012)'. Both tables show the same values: Salary: \$53,181.36, Insurance: \$5,288.66, Benefits: \$17,108.44, and a Total of \$75,578.46. The page also includes a 'HELP AND SUPPORT' section and a footer with the version number '1.2.2.1223' and the text 'Governor's Office of Planning & Budget, State of Utah'.

Authorized (2011)		Requested (2012)	
Salary:	\$53,181.36	Salary:	\$53,181.36
Insurance:	\$5,288.66	Insurance:	\$5,288.66
Benefits:	\$17,108.44	Benefits:	\$17,108.44
Total:	\$75,578.46	Total:	\$75,578.46

vii. **Unit & Funding Assignments** – Allows you to set the allocation of unit(s) assigned to that employee as well as the revenue code(s) for the employees.

The screenshot shows the 'Budget Prep - Personnel Info' interface in a Windows Internet Explorer browser. The page title is 'Budget Prep - Personnel Info - Windows Internet Explorer'. The URL is 'http://budgetprep.at.utah.gov/budgetprep/secure/personnelEdit.action'. The page contains several tabs: 'Salary', 'Insurance', 'Salary Driven Benefits', 'Totals', and 'Unit & Funding Assignments'. The 'Unit & Funding Assignments' tab is selected. It displays a table with columns: 'Unit', 'Coding Block', 'Authorized Percentage', 'Requested Percentage', and 'GOPB Percentage'. The table shows two rows of funding assignments for Unit 1110. The first row is for '1000-CAA-1110---' with an 'ASSIGN FUNDING' button and a 'Remove' button. The second row is for '0011 General Fund' with a 'Remove' button. The 'Totals' row shows 100% for all three percentages. The page also includes a 'HELP AND SUPPORT' section and a footer with the version number '1.2.2.1223' and the text 'Governor's Office of Planning & Budget, State of Utah'.

Unit	Coding Block	Authorized Percentage	Requested Percentage	GOPB Percentage
1110	1000-CAA-1110---	100	100	100
	0011 General Fund	100	100	100
Totals		100%	100%	100%

2. Select **Save Employee** when you are done adjusting the employee costs.

Search for a Person

Scenario: Search for a person's information by name, employee number, or PCN.

1. Navigate to the **Employee Costs** menu item, BR-Budget Request, and select **BR-Search Personnel** from the menu items
2. Search for a person by Last Name, First Name, Employee Number or PCN and select **Search**. The more information you provide the narrower your search results.

Search Personnel

Last Name:

First Name:

Employee Number:

Employee PCN:

Search

Reset

3. This will display a list of users that meet the search criteria, find your person and select **Edit** next to their name to enter the Personnel Information screen.

Employee List

128 items found, displaying 1 to 20.[First/Prev] 1, 2, 3, 4, 5, 6, 7 [Next/Last]

Lastname ↑	Firstname	Employee Number	PCN	Action
Person	Any	000000	ZZZZZ	Edit
Body	Some	111111	BBBBB	Edit
Body	No	222222	CCCCC	Edit

Adding Employees

Scenario: In some cases you will need to add new employees or vacant positions.

1. Navigate to the **Employee Costs** menu item, **Budget Request**, and select **BR-Add Employee** from the menu items

2. Add positions much like the employee. The system default many of the fields.

The screenshot shows a web browser window titled "Budget Prep - Personnel Info - Windows Internet Explorer". The address bar shows the URL "http://budgetprep.at.utah.gov/budgetprep/secure/personnelEdit.action". The browser has two tabs: "GOPB - Budget Prep" and "Budget Prep - Person...". The page has a navigation bar with links: "My Home", "Budgets", "Employee Costs", "Forms", "Reports", and "Admin". Below the navigation bar is a "Quick Links" section with a link to "Employee Costs". The main content area is titled "Budget Request Personnel Information". It contains several input fields: "*Unit:" (empty), "*First Name:" (set to "Vacant"), "*Last Name:" (set to "Vacant"), "*EIN:" (set to "85NS4DBKPW"), "Title:" (empty), and "PCN:" (empty). There is a "Save Employee" button. Below the input fields is a tabbed interface with tabs for "Salary", "Insurance", "Salary Driven Benefits", "Totals", and "Unit & Funding Assignments". The "Salary" tab is selected, showing two columns: "Authorized (2011)" and "Requested (2012)". Each column has a table with the following fields: "*Full Time Equivalent:" (100 %), "*Step:" (0), "Hours Per Year:" (2088), "*Rate:" (0.00 \$0 annually), "Uniform Allowance:" (0.00), "Firefighter's Uniform Allowance:" (0.00), and "Hazardous Duty Pay:" (0.00).

Budget Prep - Personnel Info - Windows Internet Explorer

http://budgetprep.at.utah.gov/budgetprep/secure/personnelEdit.action

File Edit View Favorites Tools Help

Server time: null

My Home Budgets Employee Costs Forms Reports Admin

Quick Links: [Employee Costs](#)

Budget Request Personnel Information

*Unit:

*First Name: *Last Name:

*EIN: Title: PCN:

Salary Insurance Salary Driven Benefits Totals Unit & Funding Assignments

Authorized (2011)		Requested (2012)	
*Full Time Equivalent:	100 %	*Full Time Equivalent:	100 %
*Step:	0	*Step:	0
Hours Per Year:	2088	Hours Per Year:	2088
*Rate:	0.00 \$0 annually	*Rate:	0.00 \$0 annually
Uniform Allowance:	0.00	Uniform Allowance:	0.00
Firefighter's Uniform Allowance:	0.00	Firefighter's Uniform Allowance:	0.00
Hazardous Duty Pay:	0.00	Hazardous Duty Pay:	0.00

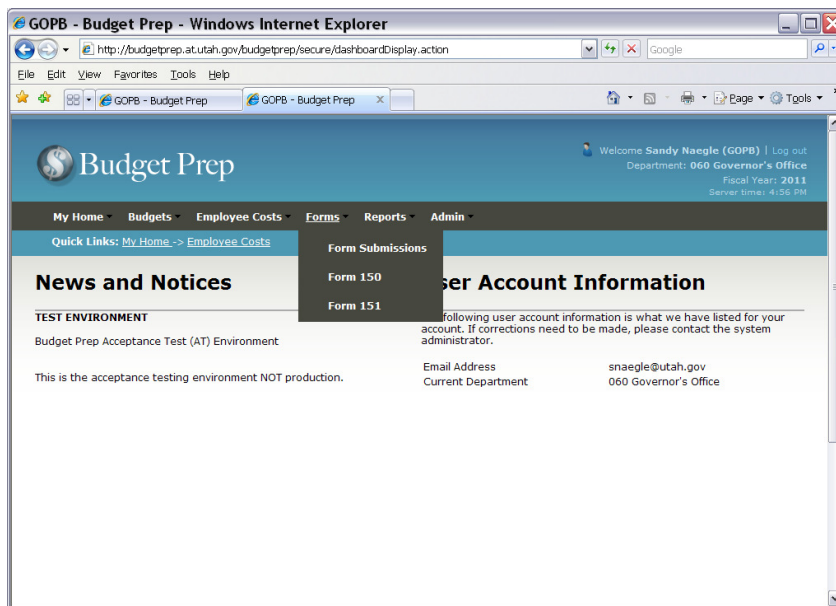
3. You will need to add the title, PCN, hourly rate and unit & funding assignment.
4. When you have finished Save the Employee.

Submitting Forms

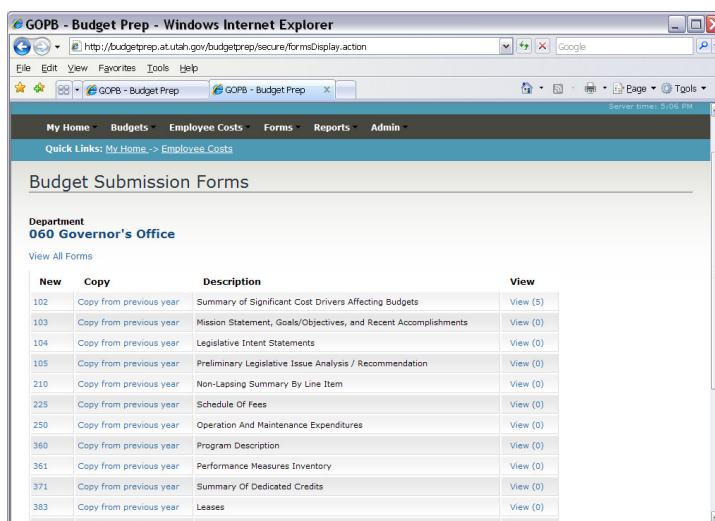
Creating a New Form Submission

Scenario: Submit your budget request forms via the application.

1. Navigate to the **Forms** menu item and select **Form Submissions** from the menu items.



2. You will be brought to the Budget Submission Forms screen.



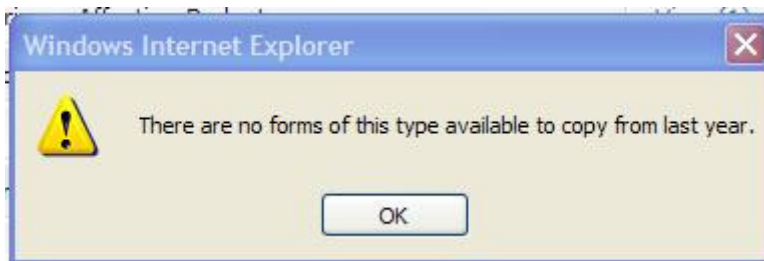
3. To create a new submission, select the form number link from the **New** column. (to the far left with the number of the form listed)

4. Enter the form information as requested and click on the Save button.
5. If you would like to print the form select **Generate PDF**.

Copying a Form from a Previous Year

Scenario: I did this last year. Can I just bring the data over and have it populate the system?

1. Navigate to the **Forms** menu item and select **Form Submissions** from the menu items.
2. Initially you will be brought to the Budget Submission Forms screen (See screenshot under Creating a New Form Submission.).
3. Copy an existing form by selecting **Copy from Previous Year** link.
The system will allow you to pick the year and the form you want to copy
4. NOTE: There is no form data the first year of the system. You will have to wait till next year to copy from a previous year.



Viewing Forms

Scenario: You may want to review your forms or go back and make adjustments to forms you have already created.

1. Navigate to the **Forms** menu item and select **Form Submissions** from the menu items.
Initially you will be brought to the Budget Submission Forms screen (See screenshot under Creating a New Form Submission.).
2. View existing forms by selecting **View(1)** (the number may be different, it just shows you how many forms you have created)
3. This will generate a list of all forms of this type.

GOBP - Budget Prep - Windows Internet Explorer

http://budgetprep.at.utah.gov/budgetprep/secure/forms/formsDisplayFormsView.action?orgSelected=...

File Edit View Favorites Tools Help

GOBP - Budget Prep

Budget Submission Forms

Department
060 Governor's Office

List of Forms of Type 102

		Form No.	Description	Status	
Edit	Print	102	060 Governor's Office	PENDING	Delete
Edit	Print	102	skjfkasdjf	SUBMITTED	Delete
Edit	Print	102	060 Governor's Office	PENDING	Delete
Edit	Print	102	Governor's Office	PENDING	Delete
Edit	Print	102	gov	SUBMITTED	Delete
Edit	Print	102	Testing ABC	PENDING	Delete

[Submit All Pending Reports](#)

HELP AND SUPPORT

BudgetPrep Version : 1.2.2.1223
Governor's Office of Planning & Budget
State of Utah

- You can edit the existing form by clicking on the corresponding edit link. This displays the details of that form.
- You can delete the existing form by clicking on the corresponding delete link.
- You can print the existing form by clicking on the Print link. This will bring up a Printable version of the selected form in a new window.

http://budgetprep.at.utah.gov/budgetprep/secure/forms/jasperFormsFormReport.action?orgSelected=...

File Edit Go To Favorites Help

http://budgetprep.at.utah.gov/budgetprep/s...

Form No. 102 Fiscal Year: 2011

Summary of Significant Cost Drivers Affecting Budgets

Coding Block: 060
Name: gov

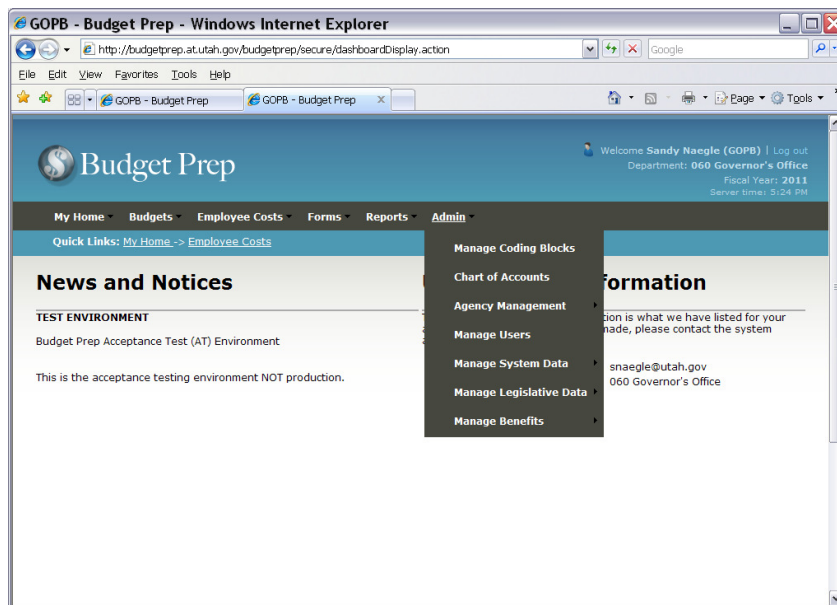
Summary
Provide a one-page executive summary of the significant cost drivers impacting your agency budget. This summary should provide GOBP and the legislature with a broad understanding of current and future budget concerns and impacts. Responses should not justify building block and/or supplemental requests, but should discuss agencywide issues that will affect current and future budgets.

1 attached file(s)

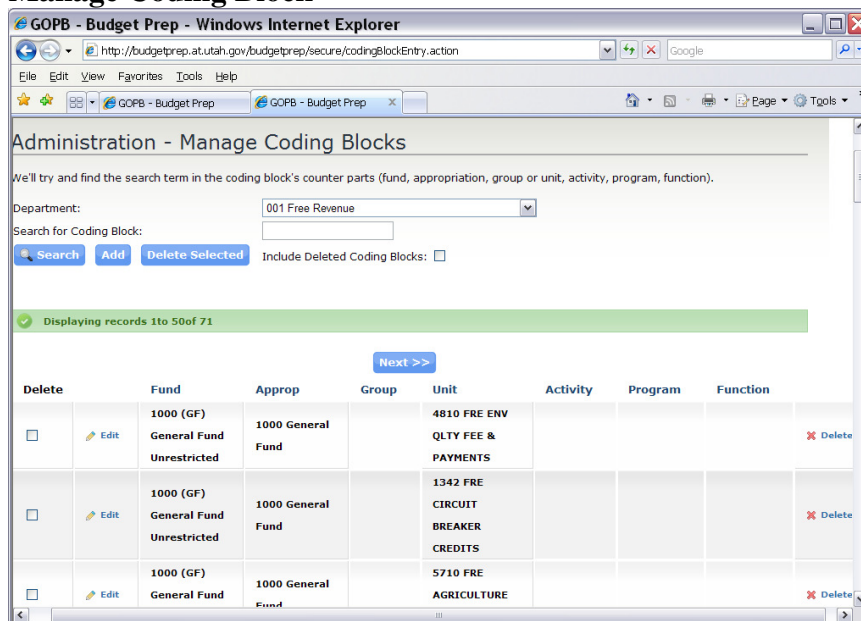
Done

Unknown Zone

Admin



Manage Coding Block







1. This selection will allow entire coding blocks to be deleted by checking the check box on the right of the code blocks you would like to delete, or you can delete one line at a time with the **X Delete**. An undo is available on this screen. You search for a coding block and check the Include Deleted Coding Blocks. *Note: You need to put at least 3 characters in your search criteria. You may use wildcards (%) if you do not know specifics. (Wild Card)*
2. New coding block relationship can be created using the Add button. This function is usually used after a new unit is created in the Agency Management (to be discussed later)



3. *Note: You need to put at least 3 characters in your search criteria. You may use wildcards (%) if you do not know specifics.*
4. The more information you provide the narrower your search results. You can also leave the search string blank if you want the entire list. Search results are displayed below your search criteria.
5. A dialog box will display and you may edit the parts of the coding block as you see fit by clicking on Select link. To change the Unit, enter a filter of at least 3 characters. This will populate the pull-down menu. Choose a Unit from the pull-down menu and click on the Select button. To update the Unit, click on the Save button.

Save A Coding Block

To search for an item, begin typing in the filter field (at least 3 characters)


***Fund:** 6680 (DTS) Enterprise Technology Fund  [select](#)  [clear](#)

***Appropriation:** HSB DTS ISF Enterprise Technology  [select](#)  [clear](#)



***Unit:** 2321 DESKTOP / LAN MANAGEMENT  [select](#)  [clear](#)



Filter



Units

Please Select An Unit 

[Select](#) [Cancel](#)

Activity:  [select](#)  [clear](#)

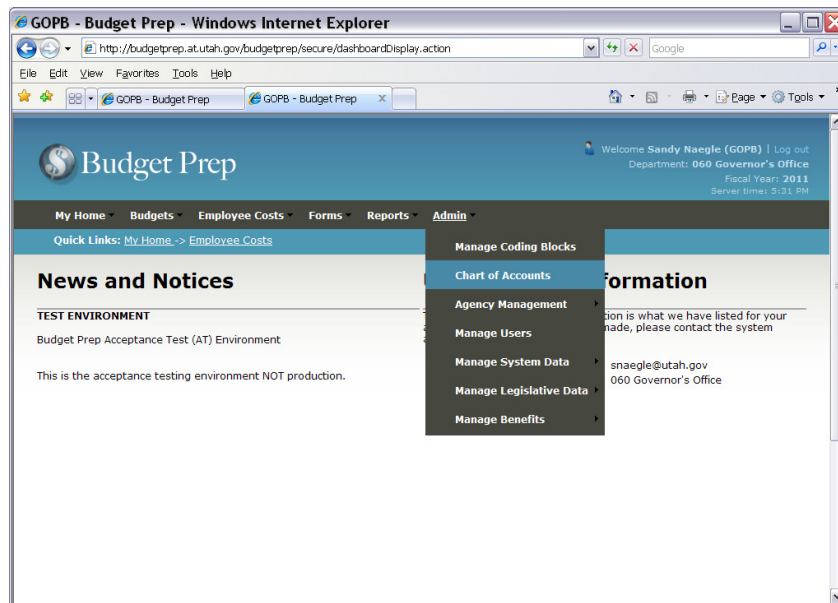
Program:  [select](#)  [clear](#)

Function:  [select](#)  [clear](#)

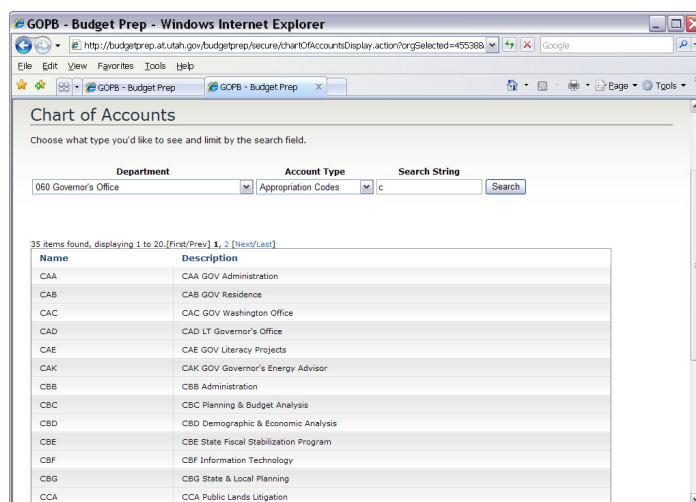
[Save](#)

Chart of Accounts

1. Navigate to the **Admin** menu item and select **Chart of Accounts** from the menu items



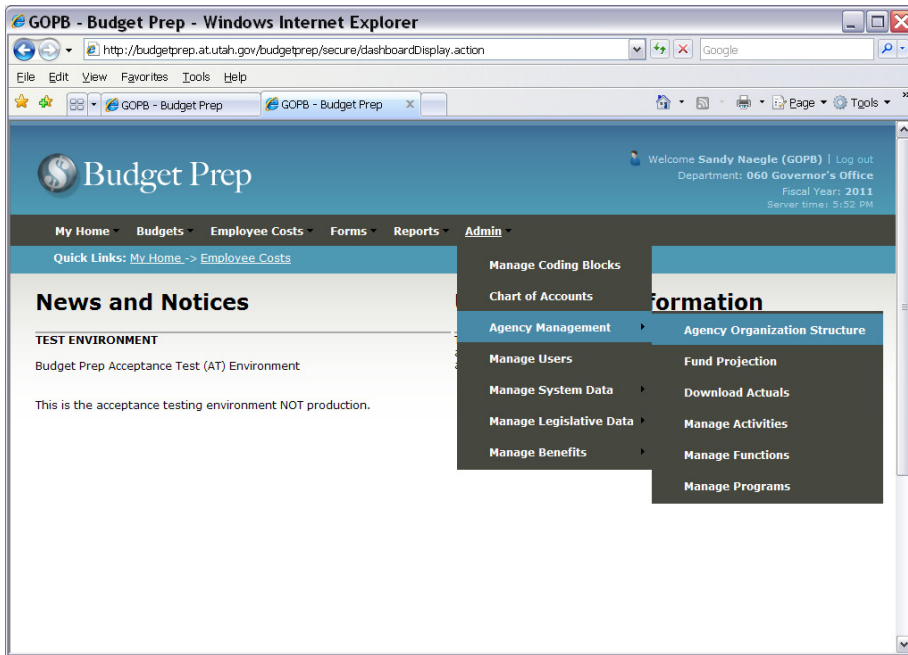
2. You can filter the results by one, or any of the following: department pull-down menu, account type pull-down menu (i.e. Fund, Appropriation, Unit) and search string input field (i.e. Unit number, Fund, Object).



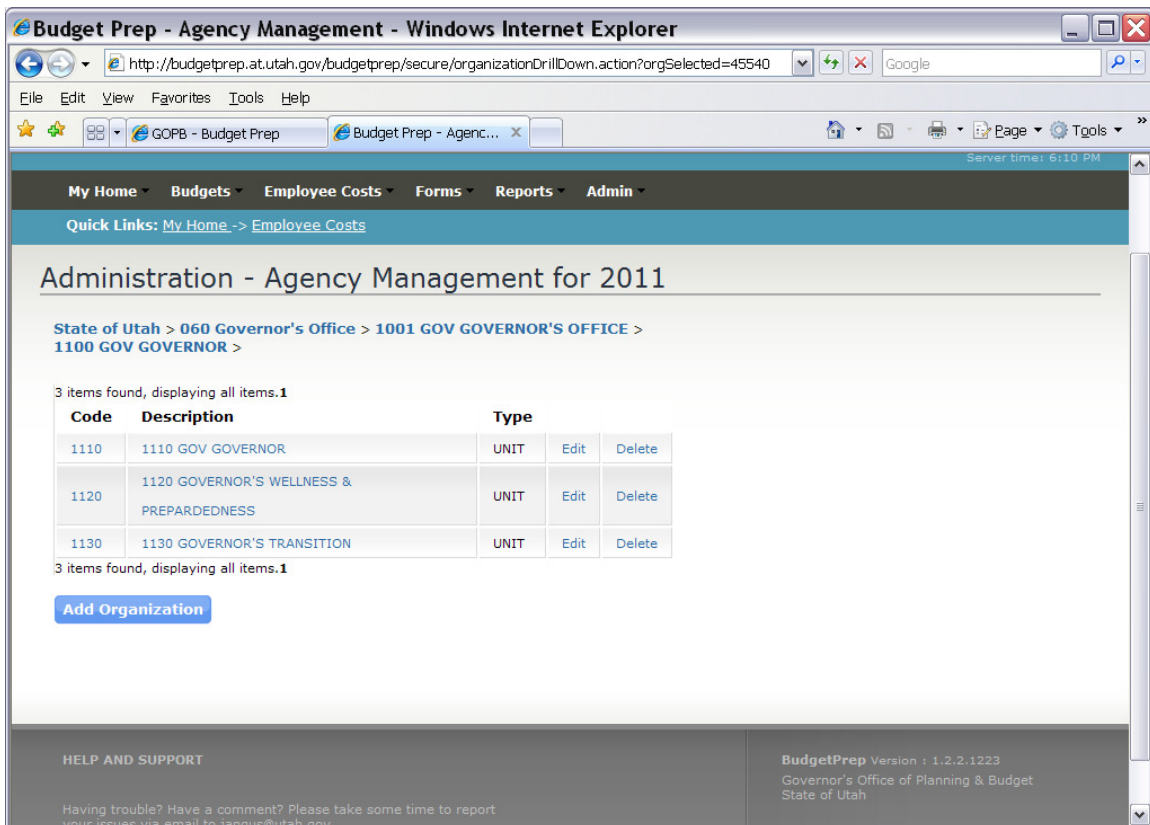
1. The selection is a view only. No changes can be made to the table

Agency Management

This selection is use to create new agency org structure (add new units). Download Actuals and Manage Activities, Functions, and Programs.



1. When Agency Management is selected you will see your department. You can now drill down to Division, Group, and Unit.



2. At every level you can Edit or Delete a code.

- When you add a new coding insure that you are adding the code to the right roll-up and Save

Budget Prep - Agency Management - Windows Internet Explorer

http://budgetprep.at.utah.gov/budgetprep/secure/organizationDrillDown.action?orgSelected=45546

Welcome Sandy Naegle (GOPB) | Log out
Department: 060 Governor's Office
Fiscal Year: 2011
Server time: 6:16 PM

My Home Budgets Employee Costs Forms Reports Admin

Quick Links: My Home -> Employee Costs

Administration

State of Utah > 060
1300 GOV WASHINGTON

One item found.1

Code	Description
1310	1310 GOV WASHINGTON

One item found.1

Add Organization

Organization Details

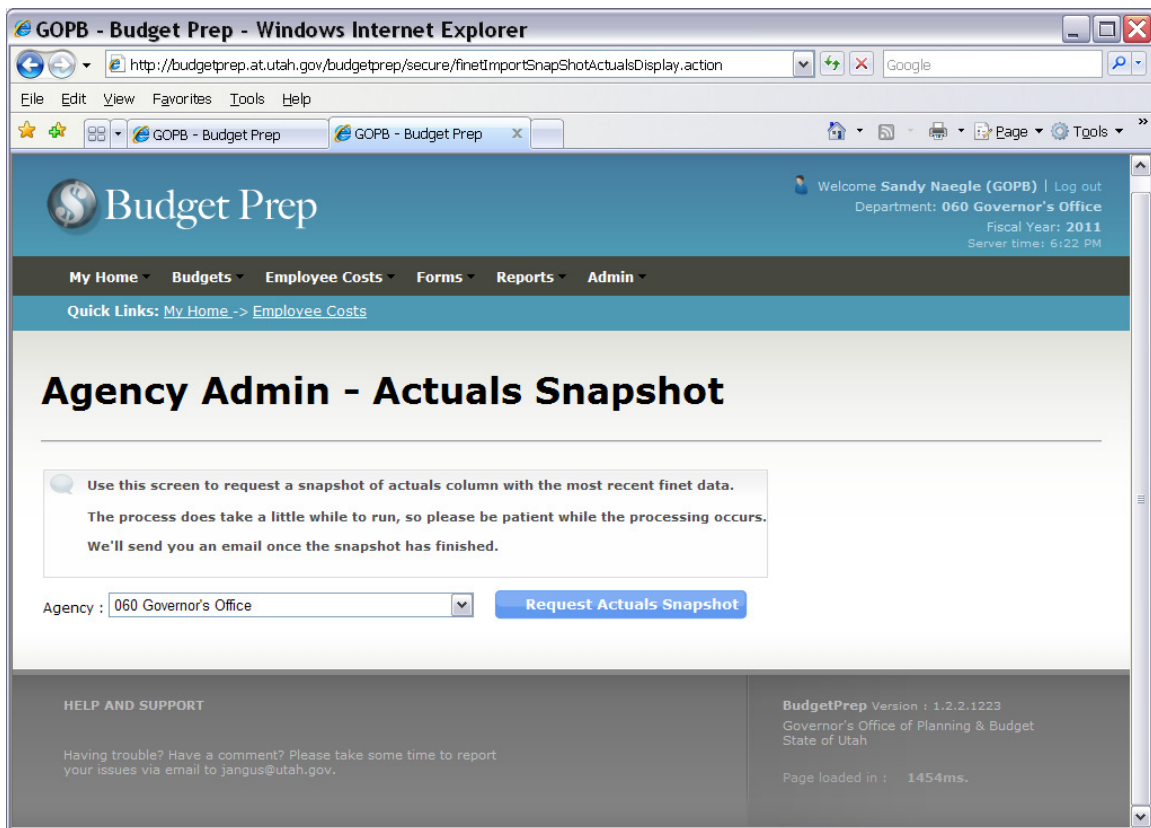
Type: UNIT
Code: 1320
Name: 1320 GOV DC
Roll Up: 1300 GOV WASHINGTON

Save

HELP AND SUPPORT
Having trouble? Have a comment? Please take some time to report

BudgetPrep Version : 1.2.2.1223
Governor's Office of Planning & Budget
State of Utah

Download Actuals



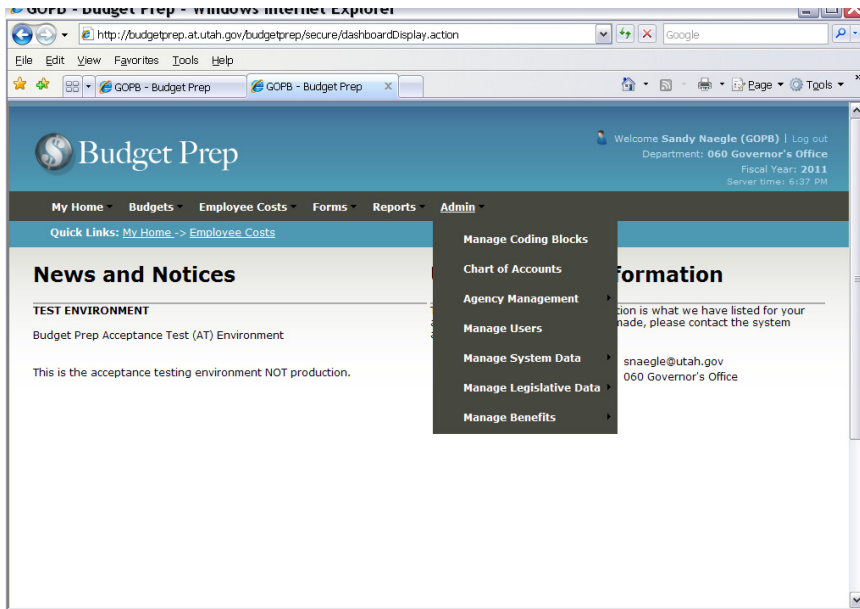
Manage Codes

1. At this selection you can Add or Search Activities, Functions, and Programs.

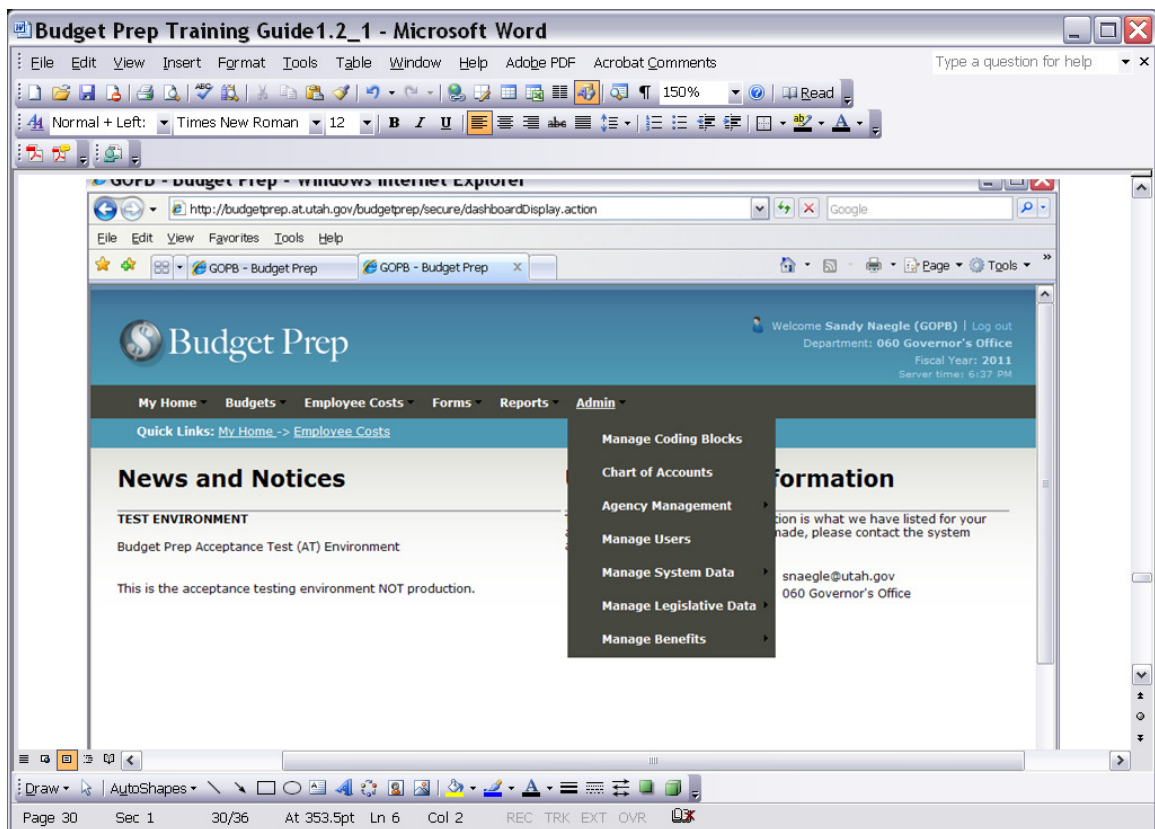
Manage Appropriations

1. At this selection you Add or Delete Appropriations

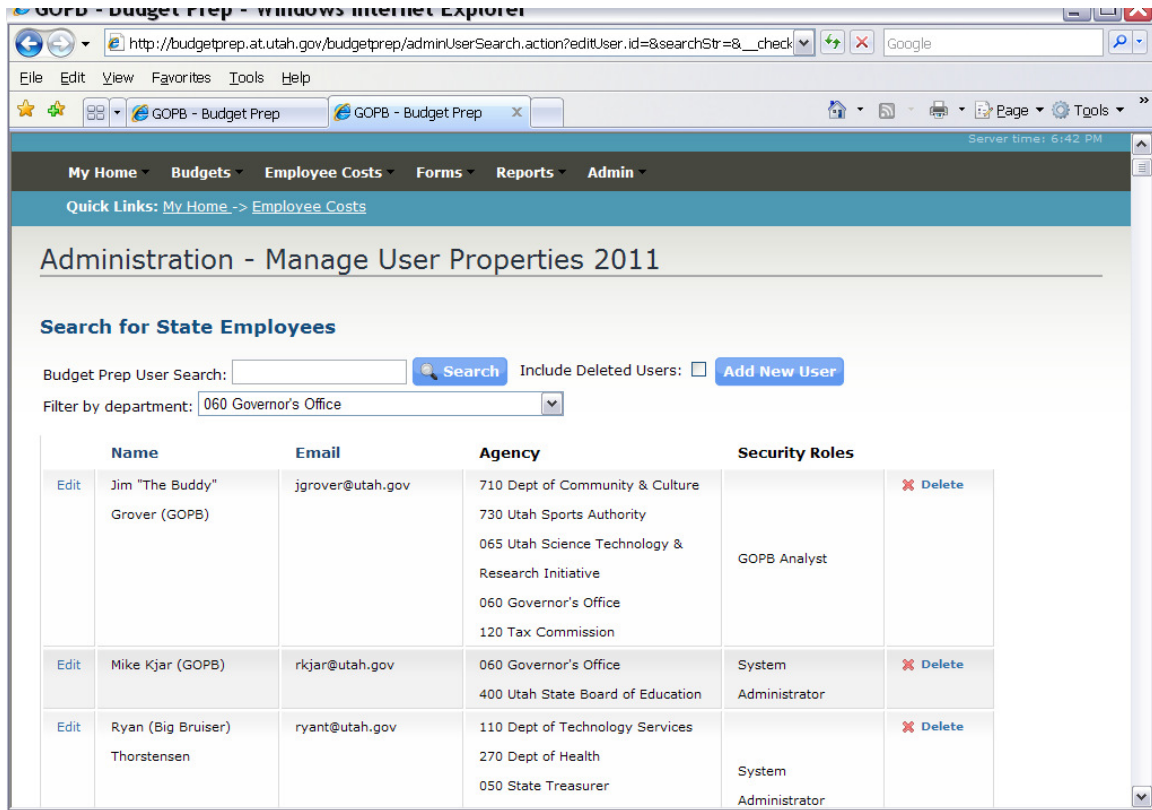
Managing Users



1. To add or delete users navigate to the **Admin** menu item and select **Manage Users** from the menu items



2. The search is now filtered by department. You can then filter your search or add new users.



3. You can edit a person's information by clicking on the corresponding Edit link.
4. You can then make any modifications needed and click on the Save button.
5. To Add new user.
 - a. Enter their name
 - b. Enter their email address (make sure it is their official utah.gov email address.)
 - c. Assign appropriate roles. A user can have more than one role. In most cases they will only have one role.
 - d. You may assign by division, group, or unit range. If a user is only assigned one unit put the same unit in both (i.e. 1110 and 1110 in both boxes.)
 - e. When finished, click on the Save button.

Add a User

Name:

Email Address:

Security Roles:

Available Roles:

- ☐ System Administration
- ☐ System Data Administrator
- ☐ GOPB Analyst
- ☐ Legislative Analyst
- ☐ Department Administrator
- ☐ Department Analyst
- ☐ View Only

Available Agencies:

001 Free Revenue

*Assigned Agency(s):

060 Governor's Office

Current Active Agency Assignment: 060 Governor's Office

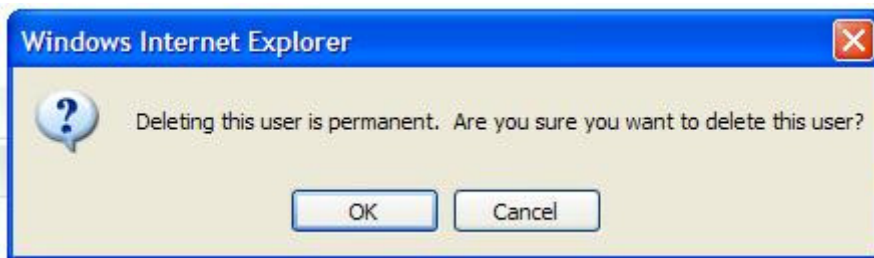
Proposed Active Agency Assignment: 060 Governor's Office

Available Divisions:

1001 GOV GOVERNOR'S OFFICE

Assigned Divisions:

6. Delete a user by selecting **Delete**. A warning dialog will appear to make sure you want to delete the user.



Viewing Reports

Budget Prep

Welcome Sandy Naegle (GOPB) | Log out
Department: 060 Governor's Office
Fiscal Year: 2011
Server time: 6:30 PM

My Home Budgets Employee Costs Forms **Reports** Admin

Quick Links: My Home -> Employee Costs

News and Notices

TEST ENVIRONMENT

Budget Prep Acceptance Test (AT) Environment

This is the acceptance testing environment NOT production.

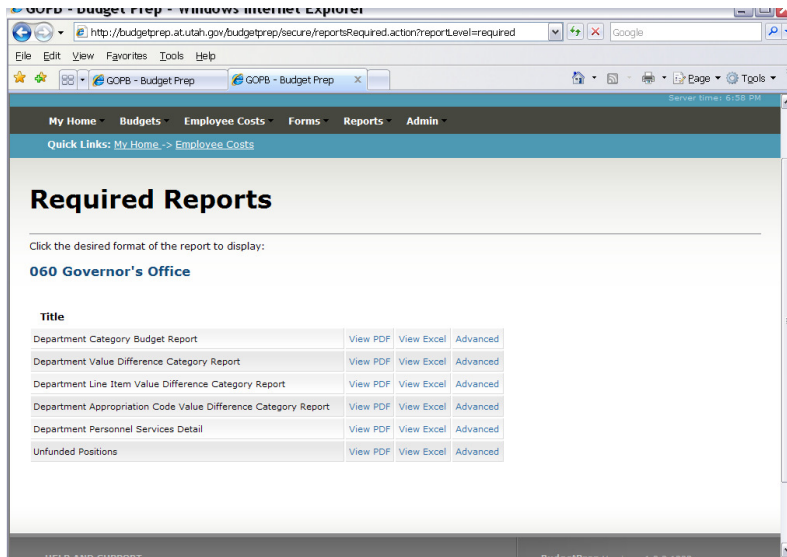
Account Information

Account information is what we have listed for your need to be made, please contact the system

naegle@utah.gov
060 Governor's Office

The Required Reports

1. These are the only reports that are required by GOPB. It is not necessary for the agency to do any printing of Reports or Forms.
2. These are reports at a department level
3. The reports can be printed PDF or Excel or a new feature Advanced
4. Advanced reporting options allows different line items to be excluded from the roll-up



The Summary Reports

1. Are level requested, ie. select the type of report
2. Organization level
3. Select the Organizational entities, one, all, or a selected few

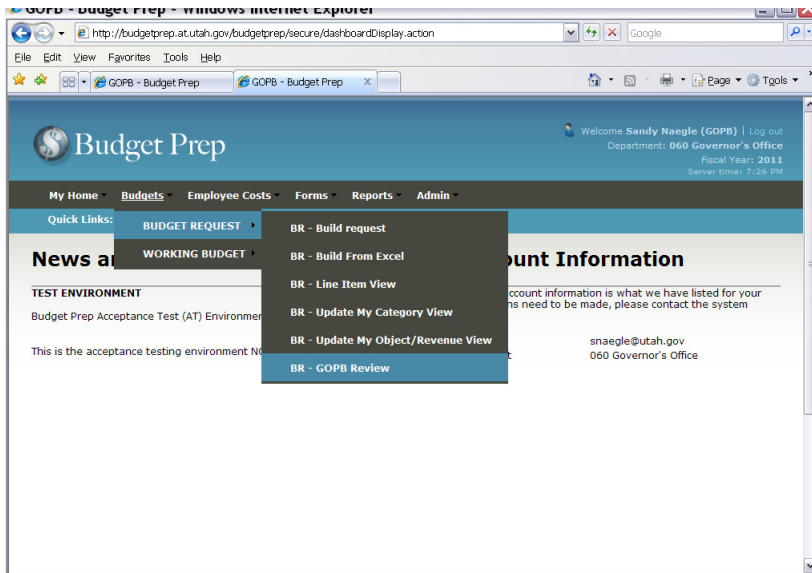
The Detail Reports

1. Are level requested, ie. select the type of report
2. Organization level
3. Select the Organizational entities, one, all, or a selected few

Submit to GOPB for Review

This function is a Department Administrator's Roll only

1. Navigate to the **Budgets** menu item, select **BR-Build Budget Request**, and **BR-GOPB** from the menu items.



2. From the Budget Request Category screen select the **Submit to GOPB for Review** button.
3. You can include a note when you are ready to submit your budget.

4. NOTE: You are about to submit this budget for GOPB Review. Once submitted for review, a budget can only be reversed by a system administrator or the GOPB Analyst.

5. There will be one more warning until you press OK.

